



Global Markets for Bottled Water Products

September 2018

Natraj Pandal

Report Code: FOD070B

Table of Contents

- Chapter 1: Introduction 2
 - Study Goals and Objectives..... 2
 - Reasons for Doing This Study..... 2
 - Scope of Report..... 2
 - Information Sources..... 3
 - Methodology..... 3
 - Geographic Breakdown..... 3
 - Analyst’s Credentials..... 9
 - Related BCC Research Report 9
- Chapter 2: Summary and Highlights..... 11
- Chapter 3: Market and Technology Background 14
 - Cost of Bottled Water 15
 - Legislation and Regulation..... 15
 - United States 16
 - Food Standards Australia New Zealand 17
 - Council of Canadians 17
 - European Union..... 17
 - Bottled Water Versus Tap Water 18
 - Supply Chain..... 18
 - Packaging..... 19
 - Product Development, Branding, Marketing 19
 - Private Label 21
 - Distribution..... 21
 - Porter’s Five Forces Analysis..... 22
 - Bargaining Power of Buyers 22
 - Bargaining Power of Suppliers 23
 - Threats from Substitutes..... 23
 - Threat from New Entrants..... 23
 - Competitive Rivalry 23
 - Birth of the Bottled Water Industry..... 24
 - Introduction of Purified Water 27
 - Labeling of Bottled Water 27
 - Bottled Water Versus Carbonated Beverages..... 28
 - Global Water Market 30
 - U.S. 31
 - India 31
 - China..... 33
 - Europe 36
 - Africa 38
 - Reusable Water Bottles 38
 - Water and Energy Usage 40
- Chapter 4: Market Breakdown by Product Type 46
 - Still Water 47

Carbonated Water	49
Functional Water	51
Fitness Waters	52
Flavored Water	53
Chapter 5: Market Breakdown by Packaging	55
PET Bottled Water.....	56
Glass Bottled Water	58
Water Packaged in Recyclable Cartons.....	60
Chapter 6: Market Breakdown by Distribution Channel.....	64
Supermarkets and Hypermarkets	66
Convenience Stores and Drugstores.....	67
Grocery Stores and Club Stores	68
Food Service and Vending Machines	70
Chapter 7: Market Breakdown by Product Volume Size.....	73
250 Milliliters	74
500 Milliliters	75
1 Liter	76
2 Liters.....	77
Chapter 8: Market Breakdown by Retail Market End User.....	79
Restaurants	80
Sports	82
Residential.....	83
Online.....	84
Chapter 9: Market Breakdown by Region	86
North America.....	87
North American Market for Bottled Water Products by Country	88
North American Market for Bottled Water Products by Packaging.....	90
North American Market for Bottled Water Products by Type	91
North American Market for Bottled Water Products by Distribution Channel	92
North American Market for Bottled Water by Product Volume Size.....	93
North American Market for Bottled Water Products by Retail Market End User	95
Europe.....	96
European Market for Bottled Water Products by Country	96
European Market for Bottled Water Products by Packaging	111
European Market for Bottled Water Products by Type	111
European Market for Bottled Water Products by Distribution Channel.....	113
European Market for Bottled Water Product by Volume Size	114
European Market for Bottled Water Products by Retail Market End User.....	116
Asia-Pacific	117
Asia-Pacific Market for Bottled Water Products by Country	118
Asia-Pacific Market for Bottled Water Products by Packaging	124
Asia-Pacific Market for Bottled Water Products by Type.....	125
Asia-Pacific Market for Bottled Water Products by Distribution Channel	126
Asia-Pacific Market for Bottled Water Product by Volume Size	128

Asia-Pacific Market for Bottled Water Products by Retail Market End User	129
Africa	131
African Market for Bottled Water Products by Country	131
African Market for Bottled Water Products by Packaging	134
African Market for Bottled Water Products by Type	135
African Market for Bottled Water Products by Distribution Channel	136
African Market for Bottled Water Product by Volume Size	137
African Market for Bottled Water Products by Retail Market End User	139
RoW	140
RoW Market for Bottled Water Products by Country	140
RoW Market for Bottled Water Products by Packaging	146
RoW Market for Bottled Water Products by Product Type	146
RoW Market for Bottled Water Products by Distribution Channel	147
Chapter 10: Patent Review/ New Developments	150
Patent Evaluation	150
Patent Review by Company	150
Patent Review by Country	151
Market Strategies	169
Chapter 11: Industry Structure	172
Factors Influencing Demand	172
Rising Health Concerns	172
Functional Bottled Water Growth	172
Developing Economies	173
Challenges in the Market for Bottled Water Products	173
Environmental Pollution Through Plastic Bottles	173
Opportunities for Bottled Water Product Companies	175
Innovative Water Products	175
Emerging Countries Provide Potential Growth Opportunities	175
Competitive Environment	176
Product Form	176
Product Category	176
Generic Competition	177
Budget Competition	177
Chapter 12: Company Profiles	179
About BCC Research	214
About BCC Research	215
BCC Membership	215
BCC Custom Research	215

List of Tables

Summary Table: Global Market for Bottled Water Products, by Region, Through 2022 (\$ Billions)	11
Table 1 Global Market for Bottled Water Products, by Type, Through 2022 (\$ Billions)	46
Table 2 Global Market for Still Bottled Water Products, by Region, Through 2022 (\$ Billions)	48
Table 3 Global Market for Carbonated Bottled Water Products, by Region, Through 2022 (\$ Billions).....	50
Table 4 Global Market for Functional Bottled Water Products, by Region, Through 2022 (\$ Billions)	51
Table 5 Fitness and Flavored Water Brands and Their Manufacturers	53
Table 6 Global Market for Bottled Water Products, by Packaging, Through 2022 (\$ Billions).....	55
Table 7 Global Market for PET Bottled Water Products, by Region, Through 2022 (\$ Billions)	57
Table 8 Global Market for Glass Bottled Water Products, by Region, Through 2022 (\$ Billions)	59
Table 9 Global Market for Water Packaged in Recyclable Cartons, by Region, Through 2022 (\$ Billions)	61
Table 10 Global Market for Bottled Water Products, by Distribution Channel, Through 2022 (\$ Billions)	65
Table 11 Global Market for Bottled Water Products Sold at Supermarkets and Hypermarkets, by Region, Through 2022 (\$ Billions)	66
Table 12 Global Market for Bottled Water Products Sold in Convenience Stores and Drugstores, by Region, Through 2022 (\$ Billions)	67
Table 13 Global Market for Bottled Water Products Sold at Grocery Stores and Club Stores Products, by Region, Through 2022 (\$ Billions)	69
Table 14 Global Market for Foodservice and Vending Machine Bottled Water Products, by Region, Through 2022 (\$ Billions)	70
Table 15 Water Bottle Volume Sizes.....	73
Table 16 Global Market for Bottled Water, by Product Volume Size, Through 2022 (\$ Billions).....	73
Table 17 Global Market for 250 Milliliter Bottled Water, by Region, Through 2022 (\$ Billions)	74
Table 18 Global Market for 500 Milliliter Bottled Water, by Region, Through 2022 (\$ Billions)	75
Table 19 Global Market for 1 Liter Bottled Water, by Region, Through 2022 (\$ Billions).....	76
Table 20 Global Market for 2 Liter Bottled Water, by Region, Through 2022 (\$ Billions)	77
Table 21 Global Market for Bottled Water Products, by Market End Use, Through 2022 (\$ Billions)	79
Table 22 Global Market for Bottled Water Sold in Restaurants, by Region, Through 2022 (\$ Billions)	81
Table 23 Global Market for Bottled Water Sold in the Sports Market, by Region, Through 2022 (\$ Billions).....	82
Table 24 Global Bottled Water Sold in the Residential Market, by Region, Through 2022 (\$ Billions) ..	83
Table 25 Global Market for Bottled Water Products, by Region, Through 2022 (\$ Billions).....	86
Table 26 North American Market for Bottled Water Products, by Country, Through 2022 (\$ Billions)	88
Table 27 North American Market for Bottled Water Products, by Packaging, Through 2022 (\$ Billions) .	90
Table 28 North American Market for Bottled Water Products, by Type, Through 2022 (\$ Billions).....	91
Table 29 North American Market for Bottled Water Products, by Distribution Channel, Through 2022 (\$ Billions).....	92
Table 30 North American Market for Bottled Water, by Product Volume Size, Through 2022 (\$ Billions)	94
Table 31 North American Market for Bottled Water Products, by Type of Usage, Through 2022 (\$ Billions).....	95
Table 32 European Market for Bottled Water Products, by Country, Through 2022 (\$ Billions).....	97
Table 33 European Market for Bottled Water Products, by Packaging, Through 2022 (\$ Billions).....	111
Table 34 European Market for Bottled Water Products, by Type, Through 2022 (\$ Billions).....	112
Table 35 European Market for Bottled Water Products, by Distribution Channel, Through 2022 (\$ Billions).....	113
Table 36 European Market for Bottled Water, by Product Volume Size, Through 2022 (\$ Billions)	115

Table 37 European Market for Bottled Water Products, by Type of Market Through 2022 (\$ Billions) ..	116
Table 38 Asia-Pacific Market for Bottled Water Products, by Country, Through 2022 (\$ Billions)	119
Table 39 Asia-Pacific Market for Bottled Water Products, by Packaging, Through 2022 (\$ Billions)	125
Table 40 Asia-Pacific Market for Bottled Water Products, by Type, Through 2022 (\$ Billions)	125
Table 41 Asia-Pacific Market for Bottled Water Products, by Distribution Channel, Through 2022 (\$ Billions).....	127
Table 42 Asia-Pacific Market for Bottled Water, by Product Volume Size, Through 2022 (\$ Billions)	128
Table 43 Asia-Pacific Market for Bottled Water Products, by Type of Market, Through 2022 (\$ Billions)	130
Table 44 African Market for Bottled Water Products, by Country, Through 2022 (\$ Billions).....	131
Table 45 African Market for Bottled Water Products, by Packaging, Through 2022 (\$ Billions).....	134
Table 46 African Market for Bottled Water Products, by Type, Through 2022 (\$ Billions)	135
Table 47 African Market for Bottled Water Products, by Distribution Channel, Through 2022 (\$ Billions)	136
Table 48 African Market for Bottled Water, by Product Volume Size, Through 2022 (\$ Billions).....	138
Table 49 African Market for Bottled Water Products, by Market Type of Usage, Through 2022 (\$ Billions)	139
Table 50 RoW Market for Bottled Water Products, by Country, Through 2022 (\$ Billions).....	140
Table 51 RoW Market for Bottled Water Products, by Packaging, Through 2022 (\$ Billions)	146
Table 52 RoW Market for Bottled Water Products, by Type, Through 2022 (\$ Billions).....	146
Table 53 RoW Market for Bottled Water Products, by Distribution Channel, Through 2022 (\$ Billions)	147
Table 54 Company Patent Holdings Related to Bottled Water, 2007–2016 (Number/%)	150
Table 55 Review of U.S. Patents Related to Bottled Water, 2007–2016.....	152
Table 56 Review of European Patents Related to Bottled Water, 2012–2016.....	161
Table 57 Review of Japanese Patents Related to Bottled Water, 2007–2016	164
Table 58 New Developments in Bottled Water, Through 2017.....	169
Table 59 Company Financials, Through 2016 (\$ Millions)	184
Table 60 Company Financials, Through 2016 (\$ Millions)	186
Table 61 Company Financials, Through 2016 (\$ Millions)	189
Table 62 Company Financials, Through 2016 (\$ Millions)	191
Table 63 Company Financials, Through 2016 (\$ Millions)	192
Table 64 Company Financials, Through 2016 (\$ Millions)	193
Table 65 Company Financials, Through 2016 (\$ Millions)	199
Table 66 Company Financials, Through 2016 (\$ Millions)	200
Table 67 Company Financials, Through 2016 (\$ Millions)	202
Table 68 Company Financials, Through 2016 (\$ Millions)	206
Table 69 Company Financials, Through 2016 (\$ Millions)	206
Table 70 Company Financials, Through 2016 (\$ Millions)	208
Table 71 Company Financials, Through 2017 (\$ Millions)	209
Table 72 Company Financials, Through 2016 (\$ Millions)	211
Table 73 Company Financials, Through 2017 (\$ Millions)	212
Table 74 Company Financials, Through 2016 (\$ Millions)	213

List of Figures

Summary Figure: Global Market for Bottled Water Products, by Region, 2016–2022 (\$ Billions)	12
Figure 1 Porter’s Five Forces Analysis	22
Figure 2 Global Market for Bottled Water Products, by Type, 2016–2022 (\$ Billions)	47
Figure 3 Global Market for Still Bottled Water Products, by Region, 2016–2022 (\$ Billions)	48
Figure 4 Global Market for Carbonated Bottled Water Products, by Region, 2016–2022 (\$ Billions)	50
Figure 5 Global Market for Functional Bottled Water Products, by Region, 2016–2022 (\$ Billions)	52
Figure 6 Global Market for Bottled Water Products, by Packaging, 2016–2022 (\$ Billions)	56
Figure 7 Global Market for PET Bottled Water Products, by Region, 2016–2022 (\$ Billions)	58
Figure 8 Global Market for Glass Bottled Water Products, by Region, 2016–2022 (\$ Billions).....	60
Figure 9 Global Market for Water Packaged in Recyclable Paper Cartons, by Region, 2016–2022 (\$ Billions).....	62
Figure 10 Global Market for Bottled Water Products, by Distribution Channel, 2016–2022 (\$ Billions)...	65
Figure 11 Global Market for Bottled Water Products Sold at Supermarkets and Hypermarkets, by Region, 2016–2022 (\$ Billions)	66
Figure 12 Global Market for Bottled Water Products Sold in Convenience Stores and Drugstores, by Region, 2016–2022 (\$ Billions)	68
Figure 13 Global Market for Bottled Water Products Sold at Grocery Stores and Club Stores Products, by Region, 2016–2022 (\$ Billions)	69
Figure 14 Global Market for Foodservice and Vending Machine Bottled Water Products, by Region, 2016–2022 (\$ Billions)	71
Figure 15 Global Market for Bottled Water Products, by Region, 2016–2022 (\$ Billions)	87
Figure 16 North American Market for Bottled Water Products, by Country, 2016–2022 (\$ Billions).....	89
Figure 17 North American Market for Bottled Water Products, by Type, 2016–2022 (\$ Billions).....	91
Figure 18 North American Market for Bottled Water Products, by Distribution Channel, 2016–2022 (\$ Billions).....	93
Figure 19 North American Market for Bottled Water, by Product Volume Size, 2016–2022 (\$ Billions) ..	94
Figure 20 North American Market for Bottled Water Products, by Type of Usage, 2016–2022 (\$ Billions)	95
Figure 21 European Market for Bottled Water Products, by Country, 2016–2022 (\$ Billions)	97
Figure 22 European Market for Bottled Water Products, by Type, 2016–2022 (\$ Billions)	112
Figure 23 European Market for Bottled Water Products, by Distribution Channel, 2016–2022 (\$ Billions)	114
Figure 24 European Market for Bottled Water, by	115
Figure 25 European Market for Bottled Water Products, by Retail Market Type, 2016–2022 (\$ Billions)	117
Figure 26 Asia-Pacific Market for Bottled Water Products, by Country, 2016–2022 (\$ Billions)	119
Figure 27 Asia-Pacific Market for Bottled Water Products, by Type, 2016–2022 (\$ Billions)	126
Figure 28 Asia-Pacific Market for Bottled Water Products, by Distribution Channel, 2016–2022 (\$ Billions).....	127
Figure 29 Asia-Pacific Market for Bottled Water, by Product Volume Size, 2016–2022 (\$ Billions)	129
Figure 30 Asia-Pacific Market for Bottled Water Products, by Market Type, 2016–2022 (\$ Billions).....	130
Figure 31 African Market for Bottled Water Products, by Country, 2016–2022 (\$ Billions)	132
Figure 32 African Market for Bottled Water Products, by Type, 2016–2022 (\$ Billions)	135
Figure 33 African Market for Bottled Water Products, by Distribution Channel, 2016–2022 (\$ Billions)	137
Figure 34 African Market for Bottled Water, by Product Volume Size, 2016–2022 (\$ Billions).....	138

Figure 35 African Market for Bottled Water Products, by Market Type of Usage, 2016–2022 (\$ Billions)	139
Figure 36 RoW Market for Bottled Water Products, by Country, 2016–2022 (\$ Billions)	141
Figure 37 RoW Market for Bottled Water Products, by Type, 2016–2022 (\$ Billions)	147
Figure 38 RoW Market for Bottled Water Products, by Distribution Channel, 2016–2022 (\$ Billions)	148
Figure 39 Country Shares of Patents Related to Bottled Water, 2007–2016 (%)	151
Figure 40 Distribution of Patents Issued Related to Bottled Water Products, by Year (%)	168



About BCC Research

About BCC Research

With our unparalleled 45-year history, BCC Research provides comprehensive analysis of global market sizing, forecasting and industry intelligence, covering markets where advances in science and technology are improving the quality, standard and sustainability of businesses, economies and lives.

BCC Membership

From market sizing and forecasts, to opportunity assessments and competitive analyses, our ever-expanding library gives you the data, insights and intelligence required to ensure your project is a success. Members benefit from ongoing, unlimited access to the category or collections of their choice, and most membership packages pay for themselves within two to three reports being accessed.

Did you buy this report? You may qualify to apply your purchase price toward a full membership. Call 866/285-7215 or e-mail info@bccresearch.com to request a demo.

BCC Custom Research

Our experts provide custom research projects to those working to identify new markets, introduce new products, validate existing market share, analyze competition and assess the potential for products to impact existing markets. With impressive academic credentials and broad and deep knowledge of global industrial markets, our independent analysts and consultants develop the facts, figures, analysis and assessments to inform the decisions that will move your company ahead. Confidential inquiries to: custom@bccresearch.com or 781/205-2429.

DISCLAIMER

The information developed in this report is intended to be as reliable as possible at the time of publication and is of a professional nature. This information does not constitute managerial, legal or accounting advice, nor should it be considered as a corporate policy guide, laboratory manual or an endorsement of any product, as much of the information is speculative in nature. BCC Research and the author assume no responsibility for any loss or damage that might result from reliance on the reported information or from its use.

ISBN: 978-1-62296-828-2
September 2018